



Africa Project Access

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“I dream of an Africa which is in peace with itself.”
(Nelson Rolihlahla Mandela)

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Africa Project Access Visit Reports:

Lubumbashi-Likasi-Kolwezi, DR Congo, Luapula Province, Zambia, Richards Bay, Dar es Salaam-Mtwara, Tanzania; Kinshasa-Matadi & Katanga, DR Congo; North-Western Province, Zambia; Juba, South Sudan; Tete, Zambezi Valley, Nacala, Pemba, Mozambique; Kampala, Uganda, Guinea Conakry etc

(Contact *Africa Project Access* at Johannesburg 27 11 4656770 or cell 0826510707 for details on how to obtain copies)

EDITORIAL

Some Observations from a Recent Visit to Pemba, Northern Mozambique

Pa

ul Runge of Africa Project Access recently undertook a pilot visit to Pemba to prepare for an APA business mission there at the end of October. The purpose of the mission is to investigate supply and investment opportunities arising from the major Rovuma Basin gas finds in the area. The following were some of his findings and observations.

There are two developments that have led to the current lull in activity by the major gas role players, *Anadarko* of the USA and *ENI* of Italy as well as their suppliers. The one event is the presidential elections taking place on 15 October 2014 and the other is uncertainty over the New Petroleum Law. The general view nevertheless is that activity will resume sharply in 2015.

The general consensus is that the elections will pass off peacefully and that *FRELIMO* and its new presidential candidate, *Filipe Nyusi* are likely to be victorious on a national level. Pemba appears to be strongly support the ruling party but the opposition *MDM* and *Renamo* parties are also actively campaigning in the town with little apparent incident.

The new Petroleum Law in force as from 18 August 2014 indicates that at least 25% of

the oil and gas produced has to be allocated to the national market at prices and with modes of access that will be regulated by the Mozambican government. Some observers contend that the high quantity of gas produced will not be able to be effectively absorbed by the relatively small Mozambican economy. The government is very keen to achieve maximum local beneficiation from resources finds and there is likely to be a progressive increase in state participation in the gas sector as well as a compulsion for the foreign operators to partner with Mozambican companies and individuals despite the relative lack of local technical expertise. Hence, corporate social investment programmes that include specialised training such as welding have a clear business logic. A preferential price margin of 10% for local products that meet requirements is likely to be enforced albeit that such local products are currently relatively rare. There are however some experiences local contractors and suppliers.

There is a strong presence of the specialised gas engineering companies and suppliers such as *Schlumberger* and *Baker Hughes*. Supply is made complex due to the high standards required by the gas producers and the stringent legal requirements imposed by the government. Some of these suppliers are

also active across the border in Mtwara, Tanzania and report more current activity there than in Pemba.

The envisaged large-scale *GASNOSU* gas pipeline from Palma down to Maputo is still at a very early stage and observers are referred by the implementing agency, the *Matola Gas Company* to the official website.

There are a number of logistics companies active in the area including *Bolloré* and *AMT*. The recent establishment of a new port authority for Pemba and Palma ports, *Portos de Cabo Delgado (PCD)* and *ENH Logistics (ENHILS)* of the national gas utility are important developments that will facilitate the logistical situation. Pemba port will be expanded and port installations at Palma will be required. The logistics companies are procuring feeder vessels to supply along the coast. The 450- kilometre road from Pemba to Palma has been

improved and takes a little over five hours by vehicle. The small airport at Pemba has been modernised.

There is a near frenzy of construction activity in the Pemba area and much envisaged construction in Palma. The Pemba Industrial Park is being strongly promoted by *Atterbury* and *African Century* is developing an industrial park in Palma. The former also has land in the Palma area. The peninsula area on the outskirts of Pemba town is fast filling with new resorts, luxury homes and office accommodation. In addition to the well-known *Pemba Beach Hotel*, there is the new *Nautilus Hotel* managed by *Remote Site Solutions* and the *Kauri Resort*.

Banco Unico recently established a partnership with *Nedbank* and it has a strong presence in Pemba that will be of use to South Africa-based suppliers and investors.

ADDITIONAL SERVICES

ADDITIONAL SERVICES FOR SUBSCRIBERS & ACTIVITIES OF AFRICA PROJECT ACCESS

*10-16 August 2014, Africa Project Access and the South Africa-Zambia Chamber of Commerce led a **GROUP VISIT TO LUSAKA AND LUAPULA PROVINCE, ZAMBIA**. There were fifteen delegates. The visit included site visits to a manganese mine, hydro power stations, agricultural and tourism Projects.*

*On 20 June 2014, APA led a **GROUP VISIT TO RICHARDS BAY HARBOUR**, KwaZulu-Natal to investigate inter alia future plans for the export of coal from Botswana and Swaziland, and the possibility of establishing the port as a supply centre for gas operations on the East Africa coast. The visit was facilitated by Trade & Investment KwaZulu-Natal.*

*The last **FULL APA BRIEFING** took place at Sage Pastel on Thursday 24 July 2014 and covered the regional implications of the Richards Bay Industrial Development Zone, a report by the Industrial Development Corporation on foreign direct investment flows in Africa, main findings of a renewable energies investigation in nine African countries, and lessons learned from an expert on supply chain management and logistics in the health products sector.*

*A special **PORTS AND RAIL SUB-GROUP MEETING** was held on Thursday 18 September 2014 at the Henley Business School. It was decided that the next meeting will include Transnet Capital Projects and the Africa Strategy of the Department of Public Enterprises.*

*A special **SUB-GROUP MEETING ON OPPORTUNITIES ARISING FROM THE ROVUMA BASIN (PEMBA/PALMA)** was held on Thursday 18 September 2014 at the Henley Business School. It was decided that the next meeting will include relevant development finance institutions, retail chains and commercial property management companies.*

*A **WATER & SANITATION SUB-GROUP MEETING** was held on Thursday 26 June 2014 at the Henley Business School. It was decided that the next meeting will include a water utility such as Rand Water or Umgeni Water, a contractor, an environmental consultancy, a logistics company and a development finance institution such as the DEG. It was also proposed that a special briefing be held on the financing of water and sanitation Projects in Africa.*

*A special **OIL AND GAS SUB-GROUP MEETING** was held on Thursday 13 March 2014 at the Henley Business School. The next meeting will include representatives of the South African Oil and Gas Alliance as well as Schlumberger.*

*A special **MINING SUB-GROUP MEETING** was held on Thursday 13 March 2014 at the Henley Business School. The next meeting will include representatives of a mining house, Renaissance Capital and other mining equity fund managers. A map of Africa with main mining areas will be produced. A tour of mining houses and international mining engineering companies with offices in Johannesburg will be arranged.*

*The twelfth **ICT/TELECOMMUNICATIONS SUB-GROUP** was held on Wednesday 30 July 2014 in collaboration with the South African Electro-Technical Export Council (SAEEEC) at their offices in Midrand. A group visit to South Africa-based mining, gas and engineering companies involved in major resources Projects in Africa was discussed. It was decided that representatives of the Konza City ICT Park in Kenya will be invited to address the next meeting. It was concluded that one of the main South African mobile telecommunications operators, Convergence Partners, Technology 100 and Broadband Barn from the Western Cape will also be invited.*

The **APA AGRICULTURE SUB-GROUP** briefing took place at the Henley Business School on Thursday, 10 July 2014. It was agreed that the next meeting would include representatives of the development finance institutions notably the International Finance Corporation, agriculture equity fund managers as well as agri fund managers and Agri-SA be invited. Also proposed were bio-fuels associations and private game reserve developers. The presence of a logistics company is also required.

The **APA HOTELS/COMMERCIAL PROPERTY SUB-GROUP** briefing was held on Thursday 10 July 2014 at the Henley Business School. It was agreed that, a hotel management group such as Atterbury and African Century Properties, the International Finance Corporation hotels and commercial property specialist as well as banks and a logistics company will be invited for the next briefing.

The **APA POWER SECTOR SUB-GROUP MEETING** took place at the Henley Business School on Thursday 10 April 2014. It was agreed that the next meeting will include the ESKOM Division responsible for regional transmission, TransAfrica Projects, former ESKOM official, Peter O'Connor, Doug Kune, and an EPC contractor.

The **APA TRANSPORT SECTOR SUB-GROUP MEETING** took place at the Henley Business School on Thursday 10 April 2014. It was agreed that the next meeting will include Transnet Freight Rail, Grindrod, OneLogic and a company producing locomotives in Port Elizabeth.

The sixth **APA HEALTH SECTOR SUB-GROUP MEETING** was held on Wednesday 13 November 2013 at the Henley Business School. Various health and health-related Projects and initiatives were discussed. It was agreed that the APA ICT and Health sub-groups should merge for a special session on the application of ICT in the health sector and specifically remote diagnosis. The sector lead for health at the International Finance Corporation as well as a specialist on cold chain warehousing should be invited.

Africa Project Access is participating with the Johannesburg Chamber of Commerce & Industry (JCCI) on a series of **AFRICA MARKET FOCUS BRIEFINGS**. The last was held on 17 September 2014 on the Kinshasa-Matadi and Kolwezi-Lubumbashi Corridors in the DR Congo.

The July-August edition of the London-based publication, **AFRICA INVESTOR** carries articles on African Infrastructure Funds, liberalisation of the African energy sector, President Kenyatta, offshore and low-cost tax jurisdictions, African cocoa production, hotel developments and the issue of land rights. Paul Runge of APA has a regular projects feature in the publication, "In The Pipeline."

The April/May 2014 edition of **AFRICAN TRADER** carries articles on renewable energies, investments in Africa, the power deficit, broadband infrastructure, the Northwest rail in Zambia, Nigerian petroleum import dilemma, red meat for Africa and GMO crops.

PROJECTS

(Africa Project Access subscribers are welcome to contact Paul or Nicole at Johannesburg telephone 27 11 4656770, cell 0826510707, Email: afric.projs@pixie.co.za for templates/further details/contacts pertaining to specific Projects listed below)

BOTSWANA

The Botswana government has allocated funds for the establishment for the establishment of the **TSHELE HILLS PETROLEUM STORAGE FACILITY** in Kgatleng, southern Botswana. The Project is for a bulk petroleum strategic storage depot with a combined capacity of 149 000 cubic metres for unleaded petrol, diesel and paraffin. Included too are road and rail offloading bays, a fire pump house and staff residential units. The environment engineering company, *Royal Haskoning DHV* is designing a control and instrumentation system. The facility will be run by the recently-inaugurated *Botswana Oil Limited (BOL)*. The Department of Energy is the responsible ministry. Reliable diesel supply is essential for the mines as well as emergency power supply. The mandate of *BOL* will be to ensure security and efficiency of supply and primary distribution of petroleum products throughout the country.

BURUNDI

Operations at the **MUSONGATI NICKEL PROJECT** have just been launched. The resource is estimated at 150 million tons. The concession is being operated by *Burundi Musongati Mining (BMM)* which is a joint venture between the Burundi government and *Burundi Mining Metallurgy International*. An ancillary Project is the construction of an 800MW hydro power plant in the area. Transport infrastructure is also required. Nickel is also found at Nyabikere and Waga in the same region. The deposits have been known for some time but the lack of support transport infrastructure has meant that they have been stranded. The *African Development Bank (AfDB)* undertook a nickel resource study in 2009. The Ministry of Energy and Mines is the responsible authority.

CONGO (DEMOCRATIC REPUBLIC)

A sod-turning ceremony was recently held for the new **SHOPRITE RETAIL CENTRE AND MALL** at Luano City, opposite Lubumbashi airport in Katanga. The site extends over 300 hectares. The cost of the Project is USD 1,4 million. The will be the DR Congo's first modern mall and second *Shoprite* centre after Kinshasa. The Project management company is *Forum Properties Africa*. The city of Lubumbashi is undergoing substantial infrastructure improvements including road works.

The joint venture company, *SACIM (Société Anhui-Congo d'Investissement Minier)* has announced plans to develop the **TSHIBWE DIAMOND PROJECT** in Kasai Oriental Province. It is hoped that the mine will produce 50 000 carates per month. The Project necessitates the construction of the Tshibwe-Mbuji Mayi road and completion of the 4,6 MW Movo hydro power plant at a cost of USD 6million. Some USD 100 million will be invested in infrastructure. *SACIM* is a joint venture of *Anhui Foreign Economic Construction Group* of China and the Congolese mining company, *SCIM*. The Ministry of Mines approved the concession.

CONGO (REPUBLIC)

A third convoy of equipment and spares has supplied the **MALOLO FARM PROJECT** situated near the town of Dolisie, Naira Province, south-western Congo, some 180 kilometres from the port of Pointe-Noire. A group of South African farmers named the *Congo Farmers Association* began operations in 2009 on an allocated site of 80 000 hectares. Water tanks have been installed. The South African agricultural group, *Afgri* assisted with some of the initial finance. The farmers have established a pre-school, clinic and agricultural training centre at the Project.

COTE D'IVOIRE

London-registered *Amara Mining* has had positive results from the drilling tests at its **YAOURE GOLD PROJECT** in central Côte d'Ivoire. The company states that twelve year mine life and estimated annual production of 325 000 ounces. Financial feasibility studies are underway. The country is developing its gold sector and hopes to double national production from 12 tons in 2013 to 25 tons in 2015. The cost of the operation is unfinalised.

The Omani civil and construction services firm, *Hasan Juma Backer (HJB)* will be investing USD 700 million in a multi-purpose **DRY PORT**. It will handle inter alia fuels, cement and grain. Grain silos will be built. Feasibility studies will follow. The Project will be implemented on a Public-Private-Partnership (PPP) basis with *HJB* as the major investor and a consortium of banks also contributing. The site of the fry port was not announced. Côte d'Ivoire and especially the port of Abidjan serves as a major trade point for the inland West African countries.

ERITREA

Canada-registered *Sunridge Gold Corporation* has entered into an agreement with the state mining utility, *Eritrean National Mining Corporation (ENAMCO)* to form the *Asmara Mining Share Company* to operate the **ASMARA GOLD-SILVER-COPPER-ZINC PROJECT**. Full production is to be achieved in three years at 40 000 ounces of gold, 65 million pounds of copper, 184 million pounds of zinc and 1 million ounces of silver. The initial feasibility study was completed in 2013.

ETHIOPIA

** The following are new **AGRICULTURAL PROJECTS** currently being promoted by Ethiopian investors and promoters:

- Dairy farm and dairy processing in the Oromia Region
- Dairy processing for export in Birhan, Amhara Region
- Agro processing and fish farming in the Holleta Zone of the Oromia Region
- Cereal crops and oil seeds in West Gojam in the Amhara Region
- Edible oil processing in Addis Ababa
- Production of carbonated soft drinks using local concentrate in Addis Ababa and Oromia Region.

Ethiopia has considerable agricultural potential.

GHANA

The wind and solar company, *Mainstream Renewable Power* has signed an agreement with *NEK Umwelttechnik* of Switzerland for the construction and operation of the **AYITEP WIND FARM** situated some 40 kilometres from Accra in southern Ghana. This will be Ghana's first major large-scale wind power

plant at 225 MW. It could generate up to ten per cent of the country's power production. The cost of the Project is estimated at around USD 500 million. Ghana is implementing a comprehensive national renewable energy Programme.

MALAWI

Investment is sought for a **COMMERCIAL PROPERTY DEVELOPMENT** at Mangochi on the southern end of Lake Malawi. The Project includes a five-star hotel, a casino and a possible golf course. There are strong efforts by the Malawian government to take advantage of the Tete-Nacala rail line which runs through southern Malawi and to develop notably the Liwonde area into an industrial zone.

The planned **SHIRE RIVER IRRIGATION SCHEME** in southern Malawi will cover an area of 42 320 hectares. Feasibility studies are being undertaken. The Project will target special crops with high export potential and will include cold chain supply facilities. Access roads will have to be built. The Malawian authorities are stressing the importance of accompanying social Projects such as those pertaining to education (schools) and health (clinics.)

MOZAMBIQUE

A single consortium will be selected for the floating liquefied natural gas facility for *ENI* of Italy's **CORAL SOUTH DEVELOPMENT PROJECT**, some 200 kilometres north-east of Pemba in the Ruvuma Basin deepwater, northern Mozambique. The *KD Consortium* comprising *Kellogg Brown Root (KBR)* of the USA and *Daewoo Shipbuilding & Marine Engineering Company* of South Korea were awarded the front end engineering design (FEED) for the facility in 2014. The engineering, procurement, construction, installation and commissioning (EPCIC) contractor should be appointed during 2015. The *KD Consortium* will be doing the engineering design for the top sides, hull and sub-sea structures of the floating facility. The facility will be a double-hull floating vessel with gas receiving, processing, liquefaction, offloading and storage capabilities. The total value of the EPCIC contract has yet to be determined.

TWO NEW HOSPITALS will be built in Beira and Marromeu . The 240-bed Beira General Hospital will cost 12 million Euros and much of the funding will be from the *Agence Francaise de Développement (AFD)*. The 140-bed Marromeu District Hospital will be financed with a Dutch grant of 11 million Euros. Construction will begin in 2015 and should be completed in 2017. An MOU has been signed between the Ministry of Health and the Dutch government and the *AFD*. The Project includes a skills training Programme.

** The master plan for the establishment of the **PEMBA OIL AND GAS SERVICES CENTRE** in northern Mozambique includes gas processing industries, piping installations, ship repair yards, container terminals, fuel supply facilities, a services centre, residential and commercial facilities, water and power supply and a reserve area for future expansion. The initial estimated cost is USD 150 million. The Centre will be an integrated logistics solution base. The Pemba centre will be submitted for Special Economic Zone (SEZ) status. The implementing agency is the recently-established utility, *Portos de Cabo Delgado*.

NAMIBIA

The **LUDERITZ PORT EXPANSION PROGRAMME** includes an allocation of 886 hectares for the export of mining production from southern Namibia as well as North-Western South Africa. This will include iron ore, phosphates, manganese and coal. The Lüderitz-Angra Deepwater facility is also being developed. The implementing agency is *Namport*.

The tender for consulting services pertaining to the **WALVIS BAY PORT AUTOMATION SYSTEM** is likely to be issued before the end of 2014. The port achieved a throughput of 752 000 tons for the year ending March 2014. In 2011, the port launched its *NAVIS SPARC N4* terminal management system as well as its customs system interface with southern Africa. The port uses a general containerised operating system which computerises gate control, ship to shore operations and container yard planning. The implementing agency is *Namport*.

The feasibility study for the planned private **WALVIS BAY WATERFRONT/MARINA** has been completed. The tender for appointment of the company that will manage the development is likely to be issued in early 2015. The initial estimated cost of the Project was N\$ 350 million. The Project entails 60 residential units and 30 water front business units. The implementing agencies are *Namport* and the Walvis Bay Municipality. The development will boost the town's tourism potential which has historically been concentrated on nearby Swakopmund.

NIGERIA

The *Bayelsa Development and Investment Corporation (BDIC)* is promoting the **BRASS FERTILIZER PROJECT** on Brass Island, Niger Delta Region, southern Nigeria. The capacity will be 5 000 metric tons per day methanol, 2 200 metric tons of ammonia and 7 700 metric tons of urea for local and export markets. The Project is scheduled for completion in 2018. The cost is estimated at USD 3,5 billion. *Saipem* has been appointed as the turn-key contractor. The implementing agency is the *Brass Fertilizer Company Limited*. Bayelsa State has estimated gas reserves of over 18 trillion cubic feet.

MTN and *Alcatel-Lucent* are collaborating on the installation of a super-fast 100 gigabits-per-second **FIBRE OPTIC NETWORK** throughout Nigeria. The network will be based on *MTN's* existing infrastructure which covers almost ninety percent of the country. The network will enable *MTN* to offer wholesale services in the region. *MTN* has 58 million subscribers in Nigeria and has to date, invested about USD 12 billion in the national mobile telecommunications network.

The **NIGERIA AUTO INDUSTRY DEVELOPMENT PLAN (NAIDP)** is aimed at encouraging the revival of local vehicle assembly plants in the country. In the 1970's, Nigeria has six assembly plants, two for cars and four for trucks in Lagos, Ibadan, Kaduna, Bauchi, Enugu. The NAIDP plans to achieve production of 300 000 units over a period of two years. It is estimated that this will create 70 000 skilled and semi-skilled jobs and stimulate SMME's. One company, *Pan Nigeria* has reportedly revived *Peugeot 301* production at its Kaduna plant. In April 2014, *Nissan* produced a first made-in-Nigeria car. A local auto industry will lead to substantial forex savings. In 2012, Nigeria imported 400 000 vehicles. The Plan implementers are the Ministry of Industry, Trade & Investment and the *Nigerian Automotive Manufacturers Association (NAMA)*.

RWANDA

The local growing, processing and agri-export company *Rwandan Mountain Tea* is investing USD 750 000 in the development of the **RUTSIRO TEA PLANTATION** which is being privatised by the state through the Ministry of Trade and Industry. Green leaf processing factories will be built. The Project is being supported by the *Rwanda Development Board*. The company runs several tea estates. The Rwandan government is implementing a policy of privatisation of productive state assets.

SOUTH AFRICA

Africa Project Access does not normally focus on Projects in South Africa. However, inserts and updates on Projects and Project-related issues in this country are included where there is involvement by the

donors, international development finance institutions and international support agencies or there is a potential for involvement by these agencies and in cases where there is an African regional context.

The agriculture department of the Western Cape Government has launched a R3 million **AGRICULTURAL FUND** to promote the development and export of high-value 'alternative crops' such as fynbos, berries and pomegranates. The initiative forms part of the province's Agricultural Action Plan. The Western Cape hopes to become a hub for agricultural exports to Angola and central-west Africa.

TANZANIA

The USA-registered *Colom Investment Limited* has announced that it will be building the 75-room executive **C TERRA MTWARA HOTEL** in Mtwara on the gas-rich southern coast of Tanzania. Completion is scheduled for September 2015. The Project includes suites and a business centre. The cost is estimated at USD 6 million. The company is already operating a hotel in Morogoro, is constructing another in Dodoma and envisages another in Lindi. The operations are being undertaken in joint venture with Tanzanians. There is a serious shortage of hotel rooms in the Mtwara area.

Tanzania will be linking its power grid to Kenya and Zambia via a 667 kilometre **INTERCONNECTOR TRANSMISSION LINE**. The line is scheduled for completion in mid-2015. The cost is estimated at USD 455 million. Funding is from the *African Development Bank (AfDB)*, the *European Investment Bank (EIB)*, *JICA* of Japan and the *Korean Economic Development Cooperation Fund*. The Ministry of Energy and Minerals has announced that Tanzania hopes to generate 3 000 MW by 2016 and plans to export gas-based and coal-fired power. The line will ultimately link with Rwanda and Burundi.

In 2013, *Kibo Mining* of Ireland began the feasibility studies for the **RUKWA COAL PROJECT** in south-western Tanzania. The objectives are to undertake a coal-to-power Project as well as a 300 MW thermal mine mouth Project. The full implementation will take five years from 2013 to 2018. An operational agreement has been signed with the Korean state company, *Korea East-West Power (EWP)*. *Standard Bank* is the financial advisor and there are reports of interest from a number of potential investors.

UGANDA

The *Uganda National Roads Authority (UNRA)* is the implementing agency for the planned **KAMPALA-JINJA TOLL EXPRESSWAY**. It will link the capital with the important industrial area of Jinja. Past plans have been for four to six lanes for the 77-kilometre road. Cost estimates have also varied from USD 700 million to USD 1 billion. There are reports that the ministry of transport will be floating a USD 1 billion Public-Private-Partnership (PPP) tender and that the *International Finance Corporation (IFC)* will be the lead financial adviser. Construction could commence in 2015 with commissioning in 2020. *COMESA* has declared it to be a priority Project that is an important component of the Mombasa-Kampala-Kigali northern corridor.

The local company, *Hudani Manji Holding Limited* will soon be launching a **BROILER FARM AND POULTRY PROCESSING PLANT** in the Semuto Nalaseke district about 100 kilometres north-west of Kampala. This will be East Africa's largest poultry plant and will have the first modernised abattoir. It will produce 32 500 birds per week. Cold chain infrastructure will be included. The cost is estimated at USD10 million. Uganda's national demand for poultry has risen sharply.

The Ugandan energy distribution network company, *Umeme* is partnering with *Centenary Bank* for the establishment of the **YAKA MOBILE ELECTRICITY PAYMENT PLATFORM** throughout the country. *Umeme* currently has 50 000 clients on the system and hopes to have all on the prepaid meter system by 2018. Reports indicate that there is a need for a comprehensive product awareness Programme.

ZAMBIA

Mbala-based *Cereal Millers* has initiated a wheat **FARMERS OUTGROWERS PROGRAMME** for the Northern Province. The company wishes to increase its flour production and to cut costs incurred in transporting wheat from the Mkushi Farm Block. The Department of Agriculture is assisting with ensuring the appropriate wheat quality. *Cereal Millers* is also diversifying into cooking oil production through agreements with soya bean and sunflower growers. The company produces 150 tons of maize meal and 900 bags of white and brown flour per day.

The *Zambezi River Authority (ZRA)* is trying to raise the USD 300 million required for the **KARIBA DAM REHABILITATION PROJECT** on the Zimbabwe-Zambia border. The hydro dam was built in the 1950's and requires major rehabilitation and upgrade with the emphasis on the avoidance of foundation and flood gate failure and deterioration. A number of technical studies have been undertaken in recent years. The lead funders are the *World Bank*, the *African Development Bank (AfDB)* and the *European Union (EU)* with reported interest from Sweden. The installed capacity of the dam is 1 626 MW. The failure of the dam would have serious human and environmental consequences along the Zambezi Valley.

ZIMBABWE

The feasibility study for the upgrade of the Beitbridge-Bulwayo stretch of the planned **BEITBRIDGE-BULWAYO-VICTORIA FALLS HIGHWAY** has begun and should be completed early in 2015. The cost of the entire upgrade is estimated at USD 820 million with USD 380 million for the Beitbridge-Bulwayo highway and USD 440 million for the remaining section to Victoria Falls. The Beitbridge-Harare highway will be considered at a later stage. The implementing agencies are the Ministry of Transport and Infrastructural Development and the *Zimbabwe National Roads Administration (Zinara)*. The Projects fall under the national macro-economic plan: the *Zimbabwe Agenda for Sustainable Socio-Economic Transformation (Zim-Asset)*.

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REGIONAL

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COMMERCIAL PROPERTY, CONSTRUCTION, HOTELS, LEISURE DEVELOPMENTS AND TOURISM-RELATED PROJECTS

(Projects in North Africa/Maghreb Countries are included in this section)

The USA-registered *Colom Investment Limited* has announced that it will be building the 75-room executive **C TERRA MTWARA HOTEL** in Mtwara on the gas-rich southern coast of Tanzania. Completion is scheduled for September 2015. The Project includes suites and a business centre. The cost is estimated at USD 6 million. The company is already operating a hotel in Morogoro, is constructing another in Dodoma and envisages another in Lindi. The operations are being undertaken in joint venture with Tanzanians. There is a serious shortage of hotel rooms in the Mtwara area.

A sod-turning ceremony was recently held for the new **SHOPRITE RETAIL CENTRE AND MALL** at Luano City, opposite Lubumbashi airport in Katanga, DR Congo. The site extends over 300 hectares. The cost of the Project is USD 1,4 million. The will be the DR Congo's first modern mall and second *Shoprite* centre after Kinshasa. The Project management company is *Forum Properties Africa*. The city of Lubumbashi is undergoing substantial infrastructure improvements including road works.

The feasibility study for the planned private **WALVIS BAY WATERFRONT/MARINA** has been completed. The tender for appointment of the company that will manage the development is likely to be issued in early 2015. The initial estimated cost of the Project was N\$ 350 million. The Project entails 60 residential units and 30 water front business units. The implementing agencies are *Namport* and the Walvis Bay Municipality. The development will boost the town's tourism potential which has historically been concentrated on nearby Swakopmund.

There is a number of large-scale new urban **COMMERCIAL PROPERTY DEVELOPMENT PROJECTS IN NORTH AFRICA**. Prominent examples are Ayaat City situated 38 kilometres south-west of Cairo, Egypt over an area of 1,9 million square metres and costing USD 25 billion. Another is Ch'Rafate City near Tangiers, Morocco over 1 300 hectares with completion scheduled for 2020.

Investment is sought for a **COMMERCIAL PROPERTY DEVELOPMENT** at Mangochi on the southern end of Lake Malawi. The Project includes a five-star hotel, a casino and a possible golf course. There are strong efforts by the Malawian government to take advantage of the Tete-Nacala rail line which runs through southern Malawi and to develop notably the Liwonde area into an industrial zone.

** The master plan for the establishment of the **PEMBA OIL AND GAS SERVICES CENTRE** in northern Mozambique includes gas processing industries, piping installations, ship repair yards, container terminals, fuel supply facilities, a services centre, residential and commercial facilities, water and power supply and a reserve area for future expansion. The initial estimated cost is USD 150 million. The Centre will be an integrated logistics solution base. The Pemba centre will be submitted for Special Economic Zone (SEZ) status. The implementing agency is the recently-established utility, *Portos de Cabo Delgado*.

SPOTLIGHT ON AID AGENCIES, INTERNATIONAL DEVELOPMENT FINANCE INSTITUTIONS, FUNDS & SELECTED RELATED ORGANISATIONS

The *World Bank* has announced a new initiative for the promotion of Public-Private-Partnerships (PPP's) in infrastructure. The **GLOBAL INFRASTRUCTURE FACILITY (GIF)** does not fund Projects directly but seeks to unlock pension and insurance company funds through specialised advisory services. The focus is on emerging economies and developing countries. It will collaborate with regional development banks. The *GIF* hopes to have begun support to a first pilot Projects by the end of 2015. The *Macquarie Group* has joined the Initiative as an advisory partner.

CONTACTS

AIRLINE



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Engineer *Jackson Midala* is the CEO at the **DAR ES SALAAM WATER & SEWERAGE COMPANY (DAWASCO)**, telephone 255 659574095, e-mail: magembe.msika@dawasco.com

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AFRICAN REGIONAL ORGANISATIONS

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Zunaid Pochee is Marketing & Business Development Specialist at the **TRANS KALAHARI CORRIDOR SECRETARIAT**, telephone Windhoek 264 61 250071, e-mail: mbd.tkcs@tkcmc.com The *Walvis Bay Corridor Group* now has offices in Windhoek, Johannesburg, Lusaka, the DR Congo and Brazil.

ICT/TELECOMMUNICATIONS CONTACTS

Brenda Thole, is Director at **AIRTEL MONEY ZAMBIA**, telephone Lusaka 260 97 7915000. She is involved in a mobile financial services expansion Programme in Zambia.

Greta Bull is Programme Manager at the **INTERNATIONAL FINANCE CORPORATION (IFC) PARTNERSHIP FOR FINANCIAL INCLUSION PROGRAMME** telephone Lusaka 260 211 252811 or 253219. She is involved in a mobile financial services expansion Programme in Zambia.

Hatim Zougari is Country Senior Officer: Nigeria at **ALCATEL-LUCENT**, telephone Abuja 234 9 780442/3.

Alwell Ibeh is Director: Communications Sector at the Nigerian **BUREAU OF PUBLIC ENTERPRISES (BPE)**, telephone Abuja 234 9 4604400-10, e-mail: aibeh@bpeng.org The *BPE* is overseeing the liquidation of the state company, *NITEL*.

MINING CONTACTS

David Daoud is Exploration Manager at **SUNRIDGE GOLD CORPORATION** of Canada, telephone Vancouver 1 604 6889478, e-mail: info@sunridgegold.com The company is working on the Asmara Mine in Eritrea.

Danko Konchar is MD at **BURUNDI MUSONGATI MINING INTERNATIONAL** which has just commenced nickel mining operations in Burundi.

Chris Jordinson is Director at the **NAMIBIAN MARINE PHOSPHATE COMPANY LIMITED, (NAMPHOS)**, e-mail: info@namphos.com

Louis Coetzee is CEO at **KIBO MINING** which is implementing the Rukwa coal Project in Tanzania, telephone dare s Salaam 255 22 2127857, e-mail: aardvark@kibomining.com

Nigel Tamlyn is Senior Project Manager for the Yaouré gold Project in Côte d'Ivoire at **AMARA MINING**, telephone London 44 20 73981420, e-mail: admin@amaramining.com

OIL & GAS CONTACTS

The following are procurement contacts for **ENI** of Italy which is involved in the Rovuma Basin gas operations in Pemba, Mozambique:

Francesco Ranieri, Procurement Manager, **ENI East Africa**, telephone Maputo 258 21 497221, e-mail: Francesco.ranieri@enimozambique.eni.it

Ricardo Bueno, Operation Manager, **ENI East Africa**, telephone Maputo 258 21 497221, e-mail: Ricardo.bueno@enimozambique.eni.it

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Blaise Edja is at **ORYX GAZ COTE D'IVOIRE**, telephone Abidjan 225 21 272114, e-mail: blaise.edja@aog ltd.com

AGRICULTURE/AGRI-BUSINESS CONTACTS

Pieter Nienaber is with the **CONGO FARMERS ASSOCIATION**, telephone 27 824415503, e-mail: info@congoagri.com The President is *Deon Lezar*.

Tafadzwa Muguti is Chairman of the **SADC CASSAVA INDUSTRY ASSOCIATION**, telephone Johannesburg 27 11 7813549, e-mail: tmuguti@africapaciti.com Professor *Ian Robertson* of the *University of Zimbabwe* is a renowned cassava specialist.

HOTELS/TOURISM/COMMERCIAL PROPERTY CONTACTS

Benedicta Schall is representing **AFRICAN CENTURY** property developers in Pemba, Mozambique, e-mail: benedicta.schall@afriancentury.co.mz The company is developing the industrial park in Palma.

Martin Ras is with **HERIOT PROPERTIES**, e-mail: mras@heriot.co.za

Gielie Visser is Retail Director at **JHI PROPERTY MANAGERS**, telephone Johannesburg 27 11 9118208, e-mail: gielie.visser@jhi.co.za

HEALTH SECTOR CONTACTS

Katherine Mueller is Communications Manager for the **INTERNATIONAL FEDERATION OF THE RED CROSS (IFRC)** office in Sierra Leone, telephone 232 79241375, e-mail: Katherine.mueller@ifrc.org

Steve McAndrew is Head: Emergency Operations and *Tiina Saarikoski* is Treatment Centre Manager. The **IFRC** has recently established a second 60-bed Ebola clinic in Sierra Leone.

DONOR/DFI/FUND/ECA CONTACTS

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Justin Jacobs is Senior Manager: Africa Trade Credit with **CREDIT GUARANTEE** of South Africa, telephone Johannesburg 27 11 8897451, e-mail: Justin@cgic.co.za

UNITED NATIONS/NGO CONTACTS

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DIPLOMATIC CORPS CONTACTS

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SOUTH AFRICAN GOVERNMENT & UTILITY CONTACTS

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BRICS/ASIA/AMERICA/EUROPE CONTACTS

Lonnie Tiegs is Vice-President: Projects Africa at **TERAS CARGO TRANSPORT** of the USA, telephone 1 253 8579209, e-mail: ltiegs@terasamerica.com The company is partnering with South African contractors on the port and engineering developments in Pemba/Palma in Mozambique.

Chuck Rankin is Managing Partner at **HOVER BARGE INTERNATIONAL** of the USA, telephone 1 702 3357335, e-mail: chuck.rankin@hoverbargeint.com

USEFUL WEBSITES

Today's Trade News is a useful feature on the website of the South African specialised publication, **FREIGHT & TRADING WEEKLY** supplying updates on current trade issues in Africa. The site is www.ftwonline.co.za

The website of the **DOING BUSINESS PROJECT** provides objective measures of business regulations for local firms in 189 economies. Its latest initiative is a series of reports on doing business in Nigeria. The site is www.doingbusiness.com

PROJECT-RELATED ACHIEVEMENTS AND/OR ACTIVITIES OF AFRICA PROJECT NEWSLETTER SUBSCRIBERS, ASSOCIATES AND CONTACTS

KWIKSPACE MODULAR BUILDINGS has recently bought land in the Pemba area of northern Mozambique and will be establishing an assembly facility there. It also has a rental facility in Palma.

SANLAM EMERGING MARKETS (SEM) has announced its acquisition of a 40% share in one of Ghana's largest insurance companies, *Enterprise Insurance Company*.

The recent **AFRICA INVESTOR INVESTMENT & BUSINESS LEADER AWARDS 2014** included *Standard Bank* as Banker of the Year and *General Electric Africa* for the Green Investment Initiative of the Year.

TRAVEL NOTES

It is important to retain boarding pass tabs for **LAM TRANSIT FLIGHTS** in Mozambique. *LAM* flights from Johannesburg destined for Mozambique's regional airports (Tete, Pemba) entail brief disembarkment at Maputo airport. The process is quick and efficient.

The **KASUMBALESA BORDER POST** is particularly congested at the moment due to a new IT system being implemented on the DR Congo side. There are reports of queues of trucks for 20 kilometres on the Zambian side.

Road travellers visiting Zimbabwe report that Zimbabwean customs at the **BEIT BRIDGE BORDER POST** are demanding duties for a wide range of goods including blankets. They remark that there appears to be a concerted effort to generate more revenue. The delays are considerable at almost a day's delay.

FORTHCOMING EVENTS

Inserts in bold, italics and larger font indicate participation by Africa Project Access:

The **21st AFRICA OIL WEEK** Conference and Exhibition will be taking place 3-7 November 2014 in Cape Town. **Contact:** e-mail: jodee@glopac-partners.com

The *Johannesburg Chamber of Commerce & Industry (JCCI)* is organising an **OUTWARD TRADE MISSION TO RWANDA AND BURUNDI** 11-15 November 2014.

Contact: *Melitta Openshaw*, e-mail: melitta@jcci.co.za

The annual **AfriCom ICT/TELECOMMUNICATIONS CONFERENCE & EXHIBITION** for 2014 will be taking place at the Cape Town International Convention Centre 11-13 November.

Contact: *Julie Rey*, telephone 44 20 70175823, e-mail: Julie.rey@informa.com or *Gareth Hamer*, telephone 44 20 70174056, e-mail: gareth.hamer@informa.com

The **TANZANIA HEALTH SUMMIT** is taking place 14-15 November 2014 at the Julius Nyerere International Convention Centre, Dar es Salaam.

Contact: Telephone 255 22 2171555 or 255 682523988, e-mail: info@ths.or.tz

The **WEST AFRICAN POWER INDUSTRY CONVENTION** will be taking place 18-19 November 2014 at the Eko Hotel & Suites, Lagos, Nigeria. **Contact:** website: www.wapicforum.com

The **4th NATIONAL SMME AGRICULTURE DEVELOPMENT AIDIT CONFERENCE** will take place 19-20 November 2014 at the Sun Coast Hotels, North Beach, Durban.

Contact: *Gugu Mncube, Africa Agriculture*, telephone Johannesburg 27 11 8920070, e-mail: gugu@africa-agriculture.co.za

The **INTERNATIONAL FAIR OF LUANDA (FILDA)** will be taking place in Luanda 26-29 November 2014.

Contact: e-mail: fieras@fil-angola.co.ao

BREKBUK AFRICA will be taking place 16-19 February 2015 at the Sandton Convention Centre, Johannesburg.

Contact: *Nigel Brown*, telephone 27 11 4777000, e-mail: nbrown@breakbulk.com

The AFRICA ENERGY INDABA 2015 will be taking place 16-20 February 2015 at the Sandton Convention Centre. APA will be running an Energy Projects Roundtable on 19 February 2015. The event will feature the US-supported Power Africa Programme.

Contact: *Emma Sayers*, telephone Johannesburg 27 11 4639184, e-mail: info@energyindaba.co.za

The **GHANA OIL & GAS SUMMIT** will be taking place 21-23 April 2015 at the Accra International Conference Centre.

Contact: ghanaeng@thecwcgroup.com

AFRICA & THE GLOBAL ECONOMIC DOWNTURN

The *International Air Transport Association (IATA)* reports that annual demand for **AIR ARGO ON AFRICAN CARRIERS** has increased by 7,2%.

WHISPERINGS – FOOTNOTES

WHISPERINGS – FOOTNOTE 1

Increasing attention is being given to the development of the African **CASSAVA INDUSTRY** for the production of a variety of products including starch, pharmaceuticals and cattle feed. South African legislation stipulating that starch be derived from sugar has been changed to include cassava. Professor *Ian Robertson* of the *University of Zimbabwe* is a renowned cassava specialist.

WHISPERINGS – FOOTNOTE 2

GHANA'S NEW OIL INDUSTRY has spawned a good number of local freight and logistics management companies. *APA* made contact with them at the recent *Breakbulk* conference and exhibition in Houston, Texas.

WHISPERINGS – FOOTNOTE 3

Africa's best **FREIGHT TRANSPORT CONNECTION TO BRAZIL** is from Walvis Bay, Namibia. Shipping time is only seven days which means that Brazilian goods can reach Gauteng in ten days.

WHISPERINGS – FOOTNOTE 4

The Botswana authorities have reportedly established a world-class general cargo facility at their concession at **WALVIS BAY**, Namibia. The Trans Kalahari Corridor now includes dry ports in Botswana, the DR Congo, Zimbabwe and Zambia.

WHISPERINGS – FOOTNOTE 5

The completion of the **BENGUELA RAIL LINE** in Angola does not necessarily mean serious competition for the Trans Kalahari Corridor route. The line is likely to be dedicated to the bulk transport of copper and cobalt from the DR Congo and Zambian Copperbelts.

WHISPERINGS – FOOTNOTE 6

MINING PRODUCTION IN SOUTH AFRICA continues to fall. Statistics for August 2014 registered a year-on-year drop of just over ten percent. In July, the drop was almost eight percent. Some companies are attempting to separate their South African operations from those in the rest of the continent where the output is considerably better.

WHISPERINGS – FOOTNOTE 7

There is a number of large-scale new urban **COMMERCIAL PROPERTY DEVELOPMENT PROJECTS IN NORTH AFRICA**. Prominent examples are Ayaat City situated 38 kilometres south-west of Cairo, Egypt over an area of 1,9 million square metres and costing USD 25 billion. Another is Ch'Rafate City near Tangiers, Morocco over 1 300 hectares with completion scheduled for 2020.

WHISPERINGS – FOOTNOTE 8

SOUTH KOREA appears to be playing an increasing role in sub-Saharan Africa. Recent examples are the *Korean Economic Development Cooperation Fund's* involvement in the Tanzania-Kenya-Zambia power interconnector and agreement between the state mining utility, *Eritrean National Mining Corporation (ENAMCO)* and *Sunridge Gold* to form the *Asmara Mining Share Company* to operate the Asmara mining Project in Eritrea.

WHISPERINGS – FOOTNOTE 9

A welcome initiative is the recent establishment of the **JOINT OPERATING CENTRE (JOC) FOR THE MAPUTO DEVELOPMENT CORRIDOR**. It comprises *CFM* of Mozambique, *Transnet* of South Africa, *Swaziland Railways* and the *Maputo Port Development Corporation (MPDC)*. It is this type of regional initiative that will bring down the costs of African export and intra-Africa trade.

WHISPERINGS – FOOTNOTE 10

The extent of **INDIA'S INVOLVEMENT IN MOZAMBIQUE** has increased recently. *Coal India Limited* is assessing its recent acquisition of the Moatize coal resources and *ONGC Limited* and *Bharat Petroleum* have taken stakes in the Rovuma gas deposits. *Jindal* is also operating a coal concession in the Tete area. However, some past Indian involvement in the country has not been successful. The *RITES* and *Ircon* consortium were obliged to leave the Sena rail line rehabilitation Project.

WHISPERINGS – FOOTNOTE 11

There are numerous parties involved in the **ROVUMA BASIN OFFSHORE GAS OFFTAKE**. There are reports that *PTT Exploration & Production* of Thailand will be buying liquefied gas for export from *Anadarko* and that it will be involved in an LNG terminal. There is also interest from *ONGC* and *Bharat Petroleum* of India. The situation is confusing for an outside observer.

QUOTABLE QUOTES

QUOTABLE QUOTES 1

“There are two power factors delaying and hampering development in the DR Congo: the lack of sufficient electric power, and political power relating to the presidential elections in 2016.”
(Duncan Bonnett, Whitehouse & Associates.)

QUOTABLE QUOTES 2

“The stone age did not end because we ran out of stones. The oil age will not end because we have run out of oil.”
(Ed Osterwald, Partner, CEG-Europe at the recent Breakbulk conference in Houston, Texas.)

QUOTABLE QUOTES 3

“You lose leverage the further you go down the chain.”
(Mark Falloon of Bechtel on managing risks in mega-EPC contracts at the recent Breakbulk conference in Houston, Texas.)

FURTHER INFORMATION & INDEMNITY

***IN-DEPTH PROJECT INFORMATION
IS AVAILABLE
FOR THE FOLLOWING PROJECTS ABOVE
MARKED **
(NO CHARGE FOR SUBSCRIBERS)***

- **Agricultural Projects in Ethiopia**
- **Walvis Bay Waterfront/Marina, Namibia**
- **Pemba Oil & Gas Services Centre, Mozambique**

INDEMNITY

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